

# ERGO

## Supplier Registration

### Quick Reference

"Think before you print"

### Inhaltsverzeichnis

1. Process of On-Boarding and Recertification	2
2. Add Banking Details	3
3. Example for On Boarding or Recertification	5

# 1. Process of On-Boarding and Recertification

As an ERGO supplier, there are two ways to fill out your supplier self-assessment. One is by creating a Coupa Supplier Account or the other is to access the form directly on the website. Creating the account in the Coupa Supplier Portal (CSP) is strongly recommended, as this allows you to access your files at any time.

To do so, please select “**Join and Respond**” in our Email.

ERGO-Platz  
40198 Düsseldorf  
Vorsitzender des Aufsichtsrats: Dr. Joachim Wenning  
Vorstand: Dr. Markus Rieß (Vorsitzender),  
Dr. Ulf Mainzer, Andree Moschner, Dr. Clemens Muth, Heiko Stüber  
Sitz: Düsseldorf, Handelsregister: Amtsgericht Düsseldorf, HRB 35978

**Join and Respond**      Respond Without Joining


Overview of both options:

	<b>Coupa Supplier Portal (Join and Respond)</b>	<b>Without Account (Respond without Joining)</b>
<b>Fully capture supplier information</b>	Yes	Yes
<b>Attach documents and certificates</b>	Yes	Yes
<b>Saving and editing again</b>	Yes	No
<b>Changing data already entered and submitted</b>	Yes	No
<b>Communicate within the form via "Comment" functionality</b>	Yes	Restricted

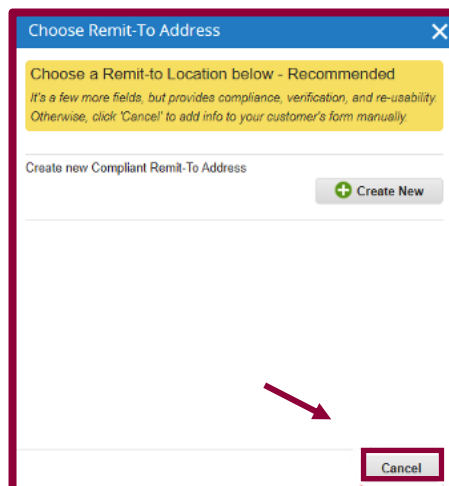
## 2. Add Banking Details

Every ERGO Supplier must provide at least one set of Banking details within Coupa. These banking details will later be used for invoices submitted by you.

To do so, please click on “Add Remit-To”.



For Coupa Supplier Portal (CSP) suppliers, a pop-up window will then appear. Please close this window by clicking on "Cancel". Non-CSP suppliers can simply ignore this step.



Please proceed by entering the banking information fields that are now available.

**\* Remit-To Address**

New Bank Account: Please keep in mind that only one single bank account per currency is to be added and that only one single bank account will be used for all payments to you! ❌

**\* Bank Account**  IBAN Number  
**Options**  Bank Account + Routing Number  
Please provide either the IBAN Number (e.g. for EU / SEPA countries) OR the Bank Account + Routing Number (e.g. for the U.S)

**\* Beneficiary Name**

**\* Bank Name**

**\* IBAN Number**  ⓘ

**\* SWIFT Code (BIC)**  ⓘ

**\* Bank Country**

**\* Account Currency**

**\* Proof of Ownership**  No file chosen  
REQUIRED to validate any new Bank Account created within Coupa

**1 Type of bank account:**

If you have a bank account within the Single Euro Payment Area (SEPA) or with an IBAN number, please click on **"IBAN number"**.

If you do NOT have a bank account with an IBAN number, for example, because your bank is located in the USA, please click on **"Bank Account + Routing Number"**.

**2 Bank information:**

When entering the bank information, please ensure that all fields are filled out and spelled correctly.

No spaces are allowed in the IBAN number and the initial Country-identifier must be entered.

When copying your IBAN from another document, it may happen that you copy spaces (e.g. at the end of the number). In this case please remove the spaces.

**3 Proof of ownership:**

In order to verify the correctness of the bank information provided, we require proof of ownership. This proof can be a bank confirmation, a blank invoice, a copy of the bank statement or any other document providing the banking information

**4 Delete input mask:**

If you have accidentally clicked on "Add Remit-to" several times or want to delete the bank details you have previously entered, please click on the cross highlighted in red.

### 3. Example for On Boarding or Recertification

Welcome to the ERGO Supplier Onboarding

---

Welcome to the ERGO Group AG supplier registration process. With 20 million customers, ERGO is one of the leading insurance groups in Germany. Outside Germany, ERGO is active in more than 30 countries, with a focus on private customer business. The focus of its international activities is on Europe and Asia. In Europe, ERGO is the market leader in health and legal expenses insurance; in its home market of Germany, ERGO is the leader in all insurance segments.

Please visit the ERGO Supplier Portal for further information, training materials and guidelines:  
<https://www.ergo.com/de/Unternehmen/Geschaeftspartner>

---

#### 1. Company Information

---

\* Company Name:   
Including full legal form.

\* Primary Address

Location Code

Address Name

PO Box

PO Box Postal Code

Street Address

Street Address 2

Postal Code

City

State Region

Country

Website:

---

Please ensure the full legal name of your company is entered

Please provide all relevant information for a clear identification and communication with your company. Mandatory are:


- Street Address
- Postal Code
- City

The Primary Contact will be our default contact in case of questions and communications with your company.

Primary Contact (Only one can exist)

\* First Name:

\* Last Name:


\* Email address:  

\* Primary Phone:       
Country Area/City Local Extension (optional)  
(including your direct extension)

Mobile Phone:       
Country Area/City Local Extension (optional)

Central Company Number:       
Country Area/City Local Extension (optional)

Please provide us also with a dedicated email address for all purchase orders. If similar to the primary contact, please enter primary contact email details again.

\* Email for Purchase Orders:    
If you don't have a dedicated email account, please enter your own company email address

\* Add Accounting Contact  Yes  No  
Do you want to add an additional contact which will be used for all accounting related topics?

\* Accounting Contact Given Name:

\* Accounting Contact Family Name:

\* Accounting / Remittance Email Address:

Please provide either the VAT ID or your local tax ID.

Covered within the German artist insurance agency?

Please let us know if withholding tax (Ger: Quellensteuer) is required for your company.

If your company is exempted from withholding tax (Ger: Quellensteuer), please provide start and end date, the exemption certificate and write down the certificate number in the description box.

### 3. Company details

---

DUNS Number  ⓘ

\* Do you have a VAT-Number?  Yes  No

\* VAT ID:

Company Registration Number:   
(Business License Number, e.g. HRB 153123)

Künstersozialkasse (KSK)  Yes. Please tick the box [✓] if you are covered within the Künstlersozialkasse.

\* Withholding Tax  Yes  No  
Does your company or the business you are involved in usually require to withhold tax?

\* Withhold Tax  Please confirm by checking the box [✓]

\* Exempt from withholding tax  Yes  No  
Are you exempted (freed) from withholding tax?


If you are exempted from withholding tax [✓], please provide the following information:


- Effective Date: Start date
- Expiration Date: End date
- Attachments: Please upload your certificate
- Details / Description: Please provide the Certificate number

Please download and fill out the competency matrix if your company provides IT products or services.


Please upload the certificate using the upload functionality.

**\* Exempt from Withholding Tax Details**

Effective Date  

Expiration Date  


Attachments [Add File](#)

 Certificate\_Withhold\_Tax\_Exemption.pdf

Details / Description

If you have selected YES [✓] for exempt from withholding tax, please add the Effective & Expiration Date and provide the certificate incl. the certificate number.

**\* IT Products / IT Services**  Yes  No  
Are you going to supply IT Products or IT Services to ERGO?

Competency Matrix  2020.01.22\_ERGO\_Competency\_Matrix...

Please submit the filled competency-matrix  2020.03.25\_E...Matrix.xlsx  
Download the form above and edit it in excel or similar tools.



Please provide your companies turnover in Euro.

If your company did not exist and therefore not generate any turnover, please enter a “0”.

Please attach a reliable financial statement. If you want to attach multiple documents, please use Zip.

Please provide the number of employees of your company.

If your company did not exist and therefore not employ any employees, please enter a “0”.

### 3.1 Key Corporate Figures

---

#### 3.1.1 Turnover in EUR

---

\* Year before last:   
In EUR. If your company did not exist at that time please enter 0.

\* Last year:   
In EUR. If your company did not exist at that time please enter 0.

\* Current year (projection):   
In EUR.

#### 3.1.2 Financial Statement

---

\* Please attach a current financial statement  Creditrefor...2d22dDe.pdf  
(e.g. from Creditreform) If multiple files are required please use a ZIP file.

#### 3.1.3 Number of Employees

---

\* Year before last:   
If your company did not exist at that time please enter 0

\* Last year:   
If your company did not exist at that time please enter 0

\* Current year:

Please provide references relevant to future business transactions with ERGO Group.

### 3.2 References Relevant to ERGO

---

#### 3.2.1 Reference 1:

---

**Company Name:**

**Products / Services provided**

Please provide context in regard to the products and/or services offered.

**Volume**   
In EUR.

**Beginning of offering**    
Date of contract signature

**End of offering**    
Date of last business transaction

---

#### 3.2.2 Reference 2

---

**Company Name:**

**Products / Services provided**

Please provide context in regard to the products and/or services offered.

**Volume**   
In EUR.

**Beginning of offering**    
Date of contract signature

**End of offering**    
Date of last business transaction

The Primary Commodity Group will be used as an initial allocation for internal routing of your onboarding form.

### 3.2.3 Reference 3

Company Name:

Products / Services provided

Please provide context in regard to the products and/or services offered.

Volume

In EUR.

Beginning of offering

Date of contract signature

End of offering

Date of last business transaction

### 3.3 Primary Commodity Group

Please select which commodity group best reflects the products you are providing. ERGO will use this information to route this form to a relevant buyer.

\* Primary Commodity Group

### 3.4 Banking Information

\* CSP Account  Yes  
 No

Did you create an account with the Coupa Supplier Portal (CSP) to access this self-assessment (log-in WITH password)?

It is MANDATORY to provide at least one bank account information.

Please add your preferred bank account by pressing "Add Remit-To".

If you do so, a "Wizard" appears. We do not need all the information requested in the "Wizard", it is sufficient to select "Cancel" and continue with the reduced onboarding form.

It is mandatory to provide at least one set of banking information.

To do so, please click on “Add Remit-To”.

If you registered with a password, a pop-up window will appear. Please select to “close” this window and do not enter any information there. The bank data can afterwards be entered in a simplified form.

Please make sure that the "proof of ownership" of the bank details is uploaded as well. This can be a bank confirmation, a blank invoice or a copy of the bank statement etc. or any other document.

### Remit-To Addresses

Add one or more Remit-To Addresses by either filling out a new Compliant Invoicing Form or choosing an Existing Remit-To Address.

[Add Remit-To](#)

#### Remit-To Address

New Bank Account: Please keep in mind that only one single bank account per currency is to be added and that only one single bank account will be used for all payments to you! ✖

\* Bank Account Options  IBAN Number  Bank Account + Routing Number  
Please provide either the IBAN Number (e.g. for EU / SEPA countries) OR the Bank Account + Routing Number (e.g. for the U.S)

\* Beneficiary Name

\* Bank Name

\* IBAN Number  i

\* SWIFT Code (BIC)  i

\* Bank Country  ▼

\* Account Currency  ▼

\* Proof of Ownership  Proof\_of\_Ownership.pdf  
REQUIRED to validate any new bank account

Please access the ERGO website as provided and download the relevant documents.

Please upload the signed documents in the respective upload functions.

## 4. Quality Information

---

### 4.1 Compliance

---

**Link to access required compliance documents:**  Please access the ERGO supplier portal and provide us with the following, signed documents.

\* Non-Disclosure Agreement (NDA):  ERGO\_NDA\_2...igned.pdf

\* Confirmation of Compliance with the Principles of the Global Compact:  Global Comp...\_signed.pdf

\* Anti-Corruption Agreement:  Anti-Corruption\_signed.pdf







### 4.2 Certifications

---

Please upload you certifications relevant to ERGO.

If your company is ISO 9001 or ISO 14001 certified, please upload your certificates including effective and expiration date.



These certificates are mandatory if required for the business relation with ERGO.

ISO 9001	
Effective Date	11/01/19 
Expiration Date	11/01/22 
Attachments	<a href="#">Add File</a>
	
Details / Description	<div style="border: 1px solid #ccc; height: 40px;"></div>
ISO 14001	
Effective Date	03/01/20 
Expiration Date	03/01/23 
Attachments	<a href="#">Add File</a>
	
Details / Description	<div style="border: 1px solid #ccc; height: 40px;"></div>

Please also upload any other certificate relevant for the business relationship with ERGO.

Please upload additional certificates such as REACH, RoHS or other Quality Assurance systems you might be certified in.  
Indicate the name of the certification in the description box (such as "REACH").

Other Certificate 1:

Effective Date	10/01/19	
Expiration Date	10/01/22	
Attachments	Add <a href="#">File</a>	
Details / Description	EU REACH Compliance certificate	

Please add the sustainability report of your company if available.

If you are already an active supplier of any other Munich RE group company, please provide further details here.

### 5. Other Information

---

\* Does your company publish a sustainability report?  Yes  No

\* Please Include a copy:

Effective Date

Expiration Date

Attachments [Add File](#)

Sustainability\_Report\_ERGO.pdf

Details / Description

\* Previous experience with a company of Munich Re Group?  Yes  No  
Have you previously done any work for any company within the Munich Re Group?

\* Entity   
For which entity/entities

\* Year

Here is room for any other remarks you wish to submit:

We are currently already an active [MunichRE](#) supplier.  
 We are looking forward to a successful business relationship.  
 Paul Smith

---

Comments ▼

Enter Comment

You can save and return to your onboarding form at any time by clicking on “**save**”.

By clicking on „Submit for Approval”, your form will be sent to ERGO for review and internal processing.

After submitting, you will receive information about any change in status of your form (approved / rejected).